

My little book on getting  
things done.

A Leadership and  
Project Management  
“cheat sheet”

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## Dedication



In visiting 51 countries the experience I am most grateful for was in Myanmar, helping at an orphanage for a short time. **Yee Mon Kyaw** gave me that opportunity so I thank her and all those who joined us in that experience.

The orphanage houses 50 kids aged 2 to 17. It was started and is run by **Daw Nu Nu Wai** (pictured above) and her wonderful team.

Some years ago, I started writing down bits and pieces that over time turned into this little book. Sadly, these few pages pretty much sum up all I know about life!

I had never planned to publish it, just to share with individuals who I thought might like it and give my kids something to read at my eulogy!

Then I came to know the orphanage is hoping to raise money for a library and so I'm offering my little book and requesting anyone who likes it please join me in making a small donation to these kids.

## How to donate

I understand people are naturally cautious about anything that involves the internet and credit cards. Me too! so there are options.

- Note- donations are not tax deductible as I am not a registered charity.

I will log every donation, pay the taxes and all costs of getting it to Daw Nu Nu Wai and Yee Mon who I trust completely. Any doubts or questions please write to [mark\\_toohey@hotmail.com](mailto:mark_toohey@hotmail.com) and put “orphanage library project” in the subject.

### Options:

**In Person** – for those of you in Miami who would like to pass a donation directly to me by cash or check that works! (I’m in the USA and they can’t spell Cheque correctly 😊)

**By Mail** – in the near-term USA checks / money orders can be sent to Mark Toohey, 1717 N Bayshore Drive, Miami, FL 33132

**Direct Deposit** - I have bank accounts in USA and Australia, (details sent out on request, email me as described above)

**In Myanmar** – I can connect you directly with Yee Mon

**Website** – Works globally and has A+ rating by US Better Business Bureau. [www.gofundme.com/orphanage-library](http://www.gofundme.com/orphanage-library)

**Thank you in advance for anything you chip in!** I will report the outcome through my social media.

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## A bit about me.

As an Army guy for 9 years I was forged in a system which can't tolerate inefficiency, laziness or stupidity because it gets people killed and THAT can ruin your whole day.

Happily, I found the commercial world in desperate need of the same decisive, logical, clear headed skill sets to do things better for less.

My career started pretty much at the absolute rock bottom in January 1980. There are NO rungs lower on the corporate ladder than Australian Army Apprentice.

Even the commanders' dog had seniority on me.

Now, 36 years later I've breathed the rarefied air in the mystical "C suite". Mind you, CTO isn't in the same class as CEO. When I proudly wrote "CTO" as occupation on an immigration form the guy asked me "what's that?"

Hmm, bummer, humbled!

I've also been "General Manager" a couple of times but that just so English and doesn't impress the ladies like "CEO" does it? (There is a lesson here about marketing but let's not digress.)

When I was "Vice President" I thought I was pretty damn cool but then people started handing out VP titles instead of pay rises.

During the 2000's we saw things like "Senior Vice President of Departmental Resource Distribution" - formerly known as "the stationary guy"

It all used to seem so important and like everyone else I would order up 300 business cards of which 290 would eventually get chucked out.

By age 45 I saw through it all and just stopped caring about titles altogether. I've started referring to myself as the coffee boy if anybody asks.

These days I gratefully take the credibility I'm given by those who know me.

In our working lives, what matters more than earning the respect and appreciation of others?

Quite sincerely, my proudest possessions are the recommendations people have written on my LinkedIn Profile. I'm so grateful that people took time to write thoughtful reviews of how they perceived me professionally. Self-praise is no recommendation and so [I include a number of these here.](#)

Career wise I'm not at the top of Mount Olympus but from tippy toes I can see it way off in the distance on a clear day if the light is just right.

And so, I can say with some measured pride that my results over the years took me to 51 countries and exposed me to some wonderful people and situations along the way.

Currently I run the Project Management Office for the worlds oldest telecommunications company, with 114 concurrent projects across 6 technology domains in 13 countries. I guess I have to be doing something right?!

These simple methods and attitudes worked for me in imperfect and diverse environments from China to El Salvador and many ports in between.

I've done ok by most measures and if you like my booklet or bits of it, that's great, you are welcome, good luck on your journey!

If you don't like it, sorry I wasted your time, please advise the usher on your way out and request a full refund!

Mark Toohey  
Miami, July 2015

## Foreword

KISS (Keep It Simple, Stupid!)

Much has been written making project management and leadership seem mystical and complex.

They're not.

The human ability to create reality from ideas is what sets us apart as a species.

Quite simply, getting it done is Project Management.

Sure enough, proven methods and principles help us achieve our goals faster, safer and cheaper but we need not slavishly follow some “global standard”.. there is no such thing as a one size fits all rule book.

As for leadership, people naturally turn toward the one who demonstrates confidence.

**Confidence is the natural by-product of competence.**

Of course both Genghis Khan and your 3<sup>rd</sup> grade teacher were leaders but that's just a matter of scale and ambition!

Some would seek to mystify it all, so in contrast this booklet is an effort to reveal the bare bone principles which I found facilitate success.



With some 60,000 years of homosapien history I suppose we have been getting better at it over time.

Equally therefore, I am sure there are no startling new ideas in here. Every concept I touch can be found in detail somewhere else.

In essence, this is a collection of thoughts and principles that have served me well. It's a "textual selfie" reflecting on my career and might be of value to people heading into management.

It doesn't pretend to be a text book or a substitute for training and getting your own experience.

Finally, "To steal ideas from one person is plagiarism; to steal from many is research" - 😊

On a serious note, this is an original work but there is nothing new under the sun. Clichés exist because they work and I quote several them here. Same with some jokes. Per Mr Google they are public domain but I credit whoever came up with them!

I don't think anything in here would be proprietary so I don't attempt to cite references. If I have missed something I apologise in advance.

## That whole Australian thing...

Bouncing around board rooms from Yangon to Honduras has had its moments.

Australians are not generally known for patience, shyness, subtlety or tact. You will never see an Australian as Secretary General of the United Nations for example.

This is mostly because we don't have those fabulous names like Kofi or Boutros Boutros-Ghali, but also because we tend to have the elegance and diplomatic skill of a scud missile.

People love to keep Australians on the coal face getting things done but it's better for all concerned to keep us away from the black tie cocktail circuit.

For better or worse, I may possibly match some of these stereotypes. Consequently, I have been banging my head on my own personal corporate ceiling for a decade.

### **Sidebar story 1:**

I was about to be hired as Director of Engineering and Operations for PCOM Middle East and Africa but the President had two past experiences with Australians and wanted to meet me first.

Seems he had an Aussie Sales Director down in Ireland just to dot the "i"s and cross the "t"s on a major sale.

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The customer was droning on about a couple of minor points and his man leaned back and said "Look mate, I know you are the customer but you're a f#cking idiot!" (Recalling this story got me through countless sales meetings with a smile).

The other guy was an Australian engineer who liked wearing loud crude t-shirts. A delegation of potential investors was visiting the factory and my boss went to ensure this person had toned it down as requested. Seen from the back it was a plain black T and much relieved he brought the investors in. Sadly, on the front it said "Roll me in honey and throw me to the lesbians"!

### **Sidebar story 2:**

I did a hugely stressful project in Myanmar but I'd been lucky to bring some long term battle hardened friends / colleagues along for the ride. We had all walked through the valley of the shadow of death together and come out the other side.

The company hired a brand new HR Director from Europe who didn't know any of us or our history. On her first day she joined the management meeting and asked my CTO " what's your full title?" I replied "Marks Bitch" and while everyone else collapsed with laughter the poor lady went into psychogenic shock. Sorry, where were we? Oh yes, back to the story...

So by now I figure the only way I'm going to get a CEO gig is to go back to running my own show with the missus as VP of Domestic Relations, the kids doing all the work and the dog as Head of Corporate Security.

Since I no longer have to concern myself with promotion I'm free to do a couple of things.

**One:** spend even less time on diplomacy, and

**Two:** share my thoughts on successful leadership and project management without literally being the author of my own redundancy.

As I said above, the truth is that what I do for a living is not all that complex. Please note however that the same can be said about scuba diving.

Step 1. Put on the kit

Step 2. Breathe

...and yet, somehow every year people die.

With that in mind, maybe the tips in here can help someone somewhere do a little better.

**Joke break:** An Australian man meets a lady at a bar – “Do you have a little bit of Australian in you”. Lady replies “No, why?”. Man replies “Would you like to?!”

## Project Management: The guts of it

With an understanding of basic project management and leadership you can succeed in any industry and with any scale of project.

After 33 years of successfully delivering projects I decided to take on two of the world's biggest formal certifications to see what I had missed.

I absolutely recommend that anyone planning a project career should do either Prince2 © or PMP ©. Neither system is the be all and end all. Neither paper will replace hands on experience, but EITHER will introduce you to a standardisation of language and methodology that you can apply to your circumstances as appropriate.

Such certifications also differentiate people. They demonstrate initiative, courage and willingness to learn. Of course if faced with similar applicants for a role and only one has undertaken such a certification then my choice is easy.

With my appreciation of such qualifications made very clear, it seems to me that formal courses in project management neglect leadership, core values and the development of instincts.

Here's 35 years worth of my thoughts on the matter.



## Start with a definition.

A project is just A DEFINED TASK in a PLANNED TIME with a PREDETERMINED BUDGET.

### **Task, Time and Budget.**

It's so simple.

Read it again.

Mark the page.

No matter if you're making coffee or building a space station, every project ever conceived is just those 3 things properly established and tracked to completion.

It's so easy, right? So how is it that people often make a mess and I've made a career out of those 3 words?

Yes, the concept is simplicity itself and to keep things grounded I'm always breaking problems back down to those 3 fundamentals.

However, the ART and the SKILL of SUPERIOR project management are found in:

- a) getting those 3 things correctly defined up front even when you don't have all the facts.
  - b) assuring success through proper resourcing
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c) measuring progress against the plan and taking corrective action when necessary

d) concise, meaningful reporting.

## **The 3 basics. Task, Timeline and Budget**

### *Task:*

The task / scope of work (SOW) is the starting point. It is absolutely fundamental to your success so make certain you get it right.

We all have a boss or bosses no matter who we are.

Always test your understanding of the task by defining it back to your boss as a brief written statement. "This is my understanding of the requirement, please confirm or re-direct"

### **They must sign off.**

Everything else flows from this committed and agreed baseline description of your objective.

If you don't lay the foundation correctly, the house you build will be flawed no matter how well you construct.

Seriously, never allow your boss to run and hide. This scope has got to be locked down.



### *Timeline:*

When you are clear on what has to be done, then establish when it has to be done by.

Always get a specific and substantiated date. Example "November 15 to meet a Christmas sales target".

A carelessly ambitious date will waste money. You may have to challenge your boss to get this right. Remember s/he is paying you to be a thinking expert not a mindless machine.

### **Intelligent and respectful questions do not anger intelligent bosses.**

Properly managed those questions will always improve the result. Your boss is rarely going to be a fool.

Share the task and timeline with your team. Its fundamental to their motivation that your team understands the big picture reason behind your decisions.

Worth noting here that to be a PROJECT at all it must have a defined deliverable and end date, not go on forever. A project typically passes into OPERATIONS and the responsibility passes from the project delivery team to the operations team.



## *Budget:*

### **It's all about the Money.**

If a project is approved and being funded, it either stands alone as a profitable exercise or is a part of a profitable bigger picture.

You may be allocated a budget based on past experience or you may need to provide key inputs into the pre-approval business case.

If you overestimate costs the scheme may be mistakenly abandoned as unprofitable and an opportunity will be lost.

If you underestimate you will corrupt the profitability study and set yourself and the owners up for failure.

### **Getting your costs correctly projected is critical.**

Some costs like salaries and rent are simple to predict and get into the business model.

Some costs are not so easy. Think about the corporate overhead for example. An appropriate portion of things like the CEOs package and the office utility bills need to be considered against your project. Why? Because if that overhead was not there you could not execute. Therefore, it's a necessary cost to your project. I used to work in a company where from time to time they would drop the chairman's Gulfstream

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fuel bill on us. Unexpected little surprises like that are why we have contingency budgets!

## Money Money Money!

It really is all about the money so it gets a big 19-page section right up front!

All my life I was never hired for my good looks. It seems every time I was hired was because the company expected me to **add more value than I cost**.

Geez.. go figure!

**“It’s not personal, it’s just business”** – the Godfather

I’ve worked for 3 billionaires in my life. It’s both hilarious and terrifying at the same time.

Funnily enough, these guys don’t have much of a sense of humour about carelessness with money. I once had a boss who joked to an Egyptian billionaire that we would go party after \$2M was dropped into his personal bank account for a start-up operation. The temperature in the room dropped below zero as the billionaire advised my boss that there is nowhere on planet earth he can hide.

There are some things it’s better not to joke about!

It took many years before I worked somewhere that took the time to explain business to me. The truth is that 99% of employees are absolutely clueless about

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the value of money and the simple mechanics of profit and loss.

To stay out of trouble the simplest rule to live by is **“spend every penny as if it was your own”**.. but people should be taught WHY.

Few folks think through the connection between revenue and expenditure.

I'm no finance guru. In fact, if I buy into some investment please run the other way, but I know this...

**Before you can spend a dollar on your project that dollar must be earned.**

Keeping the numbers round and simple, consider that a company wants to make a 20% clear profit after considering all costs.

Therefore, against sales revenue of \$10K, \$2K is profit.

- To replace a lost laptop at \$1K you have to sell \$5K.
- To pay a salary/benefits package of \$100K you have to sell HALF A MILLION DOLLARS!

In the cellular mobile driven business that's a hell of a lot of airtime! It's a lot of revenue in any business.

**Think about it and make the connection folks.**

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A simple question for you now.

Consider your own salary and benefits package. Do you bring at least 5 x that cost back into the business **just to break even**? If not you'd best be looking at exactly why having you on the payroll makes sense!

**Let's call it the 5 x rule.**

You can quickly see why it's so important to control cost.

Most people never connect the dots so push this understanding though every level of the project team.

I am often shocked by how carelessly people commit company money, often serious money.

Remember - **"Spend every dollar as if it's your own"**

## A quick and simple introduction to Financial tracking-

Nobody wants to run at a loss. Unless you work for an aid agency there is an owner somewhere looking for a tangible financial profit.

They could just put their money in the bank at zero risk and make a 2% or higher return. Therefore, when risk is attached our investors expect an adequate reward.

It's not uncommon for business to generate 20% net profit after all costs are considered but this varies dramatically by industry.

The profit simply hinges on either earning MORE money or spending LESS money.

As a PM much of your life will be about controlling the spend.

For the most part our finance function is dominated by two elements.

**Cost planning.** Very often our part of the bigger picture is very expensive. The costs under our control often make or break the viability of an entire business case as a key input into the financial model.

It is critical therefore to get this as accurate as possible.

The output of the cost planning is the cost budget, often called the capex (capital expenditure) budget.

Again, it's critical to have, but it becomes much more valuable when described over time. And that leads us to.....

### **Expenditure planning and management.**

This is all about forecasting and then measuring actual spend against the planned budget over time, finding variances and reacting accordingly.

The following example is very simple. Don't take offence, it's not meant to be condescending, it is just that this actually is very simple!

Once again, many people seem to think capex control is a deep and complex mystery.. it really isn't, trust me.

A capex tracker modelled on the example below will deliver down to the cent accuracy for you and quite possibly shock your finance team!

Not to blow my own trumpet, but I usually audit finance, not the other way around!

Usually the business needs to know two main things.

1. When the commitment to spend will be made so it can be tracked as a liability

2. When the invoicing and payments will happen. This part is often called “receiving” and it lags behind the commitment.

**Every Project Manager must feel responsible and accountable to know exactly where every dollar of her/his budget sits at any time.**

Once again, you don’t need a fancy tool. I only use Excel to manage >100 projects and >\$US100M.

A simple example to illustrate the point follows.

1. In November we do our cost planning and we determine that our capex requirement will be \$100K for widgets from Widgets R Us.
  2. For this simple example the \$100K will be committed on December 1<sup>st</sup> in one purchase order placed upon Widgets R Us.
    - a. On Dec 1<sup>st</sup> accounting will log the open purchase order commitment
  3. The payment terms agreed with Widgets R Us are
    - a. 30% upon order
    - b. 65% upon delivery
    - c. 5% 30 days after delivery
  4. Therefore, in our budget over time we will show
    - a. 100% of \$100K committed by purchase order TO Widgets R Us on Dec 1, and
    - b. Following the contract payment terms, we plan to get sent a \$30K invoice (30%)
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immediately FROM Widgits R Us. We will accept that invoice, “receive it” and process for payment

- c. Our Widgits are expected to arrive on January 20<sup>th</sup>. Therefore, we plan to receive \$65K (65%) at that time, and
- d. Finally, we plan to make the last payment of 5% 30 days after the planned delivery, i.e. Mar 20.

**This is how it looks:**

Planned (P) Capex budget = \$100K

	Nov	Dec	Jan	Feb
Committed (P)	\$0	\$100K		
Received (P)	\$0	\$30K	\$65K	\$5K

**To Manage this**, we will track ACTUAL (A) and keep the finance team advised of any shift in the plan. Doing so elaborates the table to look like this. Each month we enter our actuals as they happened. If all goes according to plan it will be very simple and look as follows by the end of the project

	Nov	Dec	Jan	Feb
Committed (P)	\$0	\$100K		
Committed (A)	\$0	\$100K		
Received (P)	\$0	\$30K	\$65K	\$5K
Received (A)	\$0	\$30K	\$65K	\$5K

However, in real life it may be that things changed. For example, Widgits R Us found some inventory and



offered us delivery on Jan 1. Therefore 65% is received Jan 1 and the final 5% on Jan 31. We align with the finance team to make sure everyone is ok and our table would look like this by the end of January

	Nov	Dec	Jan	Feb
Committed (P)	\$0	\$100K		
Committed (A)	\$0	\$100K		
Received (P)	\$0	\$30K	\$65K	\$5K
Received (A)	\$0	\$30K	\$70K	

Why did we align with finance? Remember, they have to manage the cash flow. Initial plan was to pay out \$65K on Jan 20 and \$5K in March. Even if you as the PM are sure it's a great thing to accelerate the plan you must work with finance to ensure they are able to pay out these amounts earlier.

There you go.. its really that simple.. when there are 1000 purchase orders you just wash, rinse, repeat.. soooo easy I have no idea why it's almost always a mess when I land in a new role.

There is one final concept here, that of carry forward (aka carry over or accruals or deferrals)

**Financial year, quarter, month end and carry forward.**

The finance team carves the year up into periods for management. Typically, the financial year, the quarter and the month.

**The whole block is the financial year:** if you are lucky it will just be Jan 1 to Dec 31 (the same as calendar year). It does not have to be that way. Some companies run a financial year different to calendar year, example Jul 1 2016 to year ending Jun 30 2017.

**People often refer to financial / fiscal quarters:** 12 months a year so 3 months per quarter. It is common to do a reconciliation each quarter to measure where the business sits relative to plan.

Finally, **each month** its normal to “close the books” at month end and get the picture

**Carry Forward** is the amount of money that moves across from one period to the next and is most important at the end of the financial year.

In our example we have a financial year that starts Jan 1 so therefore we span two financial years and our plan must consider carry over, see below:

	Nov	Dec	Jan	Feb
Committed (P)	\$0	\$100K		
Committed (A)	\$0	\$100K		
Received (P)	\$0	\$30K	\$65K	\$5K
Received (A)	\$0	\$30K	\$70K	

Remember we start with a budget, in this example it is \$100K.

On Dec 31 we close the financial year as follows.

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- The full budget is fully committed this fiscal year and so \$0 of approved but uncommitted budget to carry forward in this case. (\$100K approved minus \$100K committed = \$0 carry over of uncommitted approved budget). If we had an approved budget of \$100K and had not yet committed it all, that uncommitted portion would have been carry over.
- \$30K has been received by Dec 31 (First payment milestone delivered, invoiced and received in finance)
- Therefore \$70K committed in an open purchase order has to carry forward to next financial year. (\$100K PO committed minus \$30K received = \$70K committed open purchase order to carry into next year)

As project manager you must ensure that the finance team is fully aware of your carry over needs well in advance of the end of the financial year as this feeds into the new years budget!

If you neglect this, you are likely to be mid project and wake up in the new fiscal year with no money!

**So what?...** This section and the example are very simple but very important. Traditionally project managers did not feel the ownership of the capex budget creation or expenditure control. That is no longer the case!

By planning and controlling their budget with the simple tool described above a project manager can fully deliver on his / her fiscal responsibility.

### Let's talk about risk.

I wanted to think of an example of a RISK FREE way to generate income and I was struggling.

Then I recalled the Benjamin Franklin quote "In this world nothing can be said to be certain, except death and taxes". Possibly the only risk free occupations out there are funeral director and tax office minion.

The rest of us should understand risk / risk mitigation / cost benefit analysis.

Being an employee feels like it has less risk than being an entrepreneur. It's a cosy illusion! In fact, all the staff share the risk of the entrepreneurs' decisions even if we are blissfully ignorant of the fact.

The greater the risk the greater the (potential) reward right? We can choose to stick our money in the bank at 0.1% interest or buy into an investment looking for a big return with a risk of losing.

A project or venture has a **risk profile**

- What are the things that might go wrong?
- What is the potential cost?

- How can these risks be anticipated and reduced (mitigated)?

A business has a **risk appetite**

- What is our corporate tolerance for taking a risk based on our
  - Expected return on investment best case / worst case
  - Experience, confidence, courage

**No guts, no glory.**

Yep, that's true but don't go chasing glory with someone else's guts!

**Get it approved first!**

The person funding the project is likely be motivated by "The higher the risk the greater the reward".

The existence of risk is predictable but the impact of the risk maybe less so.

It feels counter intuitive, but risk is good. It creates opportunity. When you understand this it becomes clear that being more conservative than your company expects is a failure.

**Getting risks identified, analysed and quantified.**

Ultimately, understanding our risks is primarily about the financial analysis **before** we jump in.

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The process of getting there is to think the venture through, identify the risks, plan what to do about them and finally put some dollar values down.

Commonly people will refer to a “risk register” as the location for tracking all this. An excel workbook is probably the simplest way to list and analyse our “risks/benefits”

Risk is about the potential loss of money right? Right.

Having said that, this is the appropriate place to explain the funky upside down concept of “**positive risk**” that you might hear. I’ve never felt comfortable with the term. I think it’s an oxymoron like Andy Warhol claiming to be deeply superficial. To me they are simply opportunities, or, potential benefits.

The terms are associated because working through the risks will also help identify opportunities and they can be logged, analysed and quantified in the same way.

**Identify:** A good way to capture all the risks/ benefits is to brainstorm with your people around a whiteboard. If everyone is mentally mapping their part of the task they should be able to flag their concerns as risks and ideas as benefits.

**Analyse:** every scenario identified now has to be pulled apart to estimate the probability of the event and the financial implication of the event.

**Mitigate / Maximise:** We want to minimize or mitigate the risk of loss. We want to maximize any opportunity to either spend less or generate more income.

Some mitigation strategies include:

- Assuring the plan is correctly structured with the necessary human and material resources.
- Finding no cost or low cost ways to have additional resources available if required such as getting quantified assurances from vendors.
- Seeking alternative pathways with lower risk.
- Considering subcontracting of risk elements to specialists.
- Assuring all vendors are correctly qualified and insured.
- Assuring all staff are suitably qualified.
- Assuring everyone is aware of and working in compliance with any legally obligatory or otherwise beneficial standards / laws.
- Assuring that any applicable legal documents such as purchase orders and sale or leasing contracts are well structured and written to protect you.

For opportunities, fairly obviously you would just seek to squeeze out the maximum potential for each item.

**Quantify:** Now our risks are listed, analysed and mitigated we must define them. They are a valid budget line item.

The problem is that these are situations that MIGHT happen and might not!

So how do you put numbers around it?

One approach is illustrated below. I'm building a house and if I am delayed I will incur rental costs of \$5000 a month in minimum 1 month increments.

I list the scenarios I can anticipate then estimate the financial implication by considering the probability of the event

1. I'm thinking there is a 20% chance of a 3-week delay on the concrete delivery
  - $0.2 \text{ (probability)} \times \$5\text{K} = \$1\text{K}$ 
    - I will plan to spend \$1K
  
2. On the upside, I think there is a 10% chance I can get the framing done 8 weeks faster
  - $0.1 \text{ (probability)} \times \$5\text{K} \times 2 = \$1\text{K}$ 
    - I will plan to save \$1K

Of course your case will be more comprehensive, but in this simple model the swings and roundabouts deliver a net financial risk of \$0.

It's often that way in real life.



## Other Accounting terms of interest

Project managers can come from various backgrounds and are not necessarily finance trained. Very often we will have an operational background focussed on execution of projects. Don't stress about it!

Like many professions, finance folks love using key words and acronyms because it makes dull people and simple things sound sexy ;)

It is not necessary to become a CPA to responsibly manage the finances under your control but there are some fundamentals we need to know.

You can find a zillion online resources to explain basic accounting terminology. One good one is "Investopedia"

If you take on the PMI® PMP certification they provide some useful training for measuring financial performance (Earned Value Measurement).

That said, if by whatever method you understand that you have built the budget well and are tracking your expenditure properly then that's what matters.

Here is some terminology of interest to a project manager. Drop these terms into the conversation at job interviews or at bars when speaking to attractive single people to score points! (ok, I'm joking about the attractive single people thing.)

**BUDGET:** The single most relevant finance term for a PM. For us, the budget is most often simply the expected cost of doing the job. In projects we are often doing something multiple times. We should consider our budget per unit and our extended budget (unit budget times number of units) It's important to estimate the average unit budget as accurately as possible because any error is multiplied by the number of units. When measuring project financial performance each case can be checked individually against the unit budget and accumulatively against the extended budget. A specific unit may be 20% over budget while the accumulative project of 100 units may be exactly on budget. Both positions must be constantly checked

**TOP DOWN:** a quick way to pull together a budget based on past experience of similar scope.

**BOTTOM UP:** a brick by brick line by line study of all the costs to produce the budget. This can become a massive undertaking with all capex and opex lines on their own lines at monthly resolution. In the past I've done models that take weeks of intense development.. only to prove that the 5-minute top down was 99% correct!

**CAPEX:** Project Capital Expenditure is money spent on goods or services required to produce the project deliverables. It can be things like hardware and it can be for the associated work, such as transport or installation for example. The important point is that it

is not an ongoing recurring cost after the project is delivered.

**OPEX:** Operational expenditure. Think of things like rent, utility bills, salaries.. these are almost always opex. Often your finance team has tax reasons to want to “capitalize opex” and if that opex was directly tied to the delivery of a project the accounting rules allow for that. So, for example, the project manager salary is very often capitalized against the project.

**NET INCOME:** also gets cunningly disguised as net profit or the famous “bottom line”. All income minus all expenses.

**EBITDA:** Easy Bt Intimidating To Developing Aministrators... not really. Seriously, it sounds sooo coooooool to make a serious face and say “EBITDA” in a sentence now and then. Earnings Before Interest, Taxation, Depreciation and Amortization. Simply this is Net Income with the ITDA stuff put back in. Why bother? Because this way big shots can compare companies and industries without the variances of different accounting methods making a mess.

**BALANCE SHEET:** Just a summary of assets and liabilities at a specific moment in time

**PROFIT AND LOSS / P&L:** For measuring performance. Shows income and expenses for a period of time like a Quarter or Financial Year.

**RETURN ON INVESTMENT / ROI:** is NET PROFIT divided by the cost of the investment. Expressed as %.. If all costs to produce a pizza are \$10 and we sell it for \$15 our net profit is \$5 and our ROI is  $5/10$  which is 0.5 or 50%

**PRESENT VALUE (PV):** in 10 years from now inflation will have made everything cost more. \$100 then won't buy anything like what it can buy today. PV allows us to determine what a future amount of money is worth today.... Now, can you all guess what FV is? Good!

**EXIT MULTIPLE:** This this is hilarious black magic, smoke and mirrors to me. I think it's like "The emperor's new clothes". If you are familiar with that story it demonstrates how everything is fine as long as we all pretend to believe the same thing. This exit multiple is how the finance people take a mediocre business model and make it wonderful by assuming they can apply a multiple of 7 times or 20 times the EBITDA when they sell it. Now WHY anyone would want to PAY 7 or 20 times the gross income for a business eludes me. That's ok, they obviously make sense to someone and its safely beyond the scope of project management!

Righto! That's about it! Getting across these terms will get you through most money situations with the management.

Do try to have a great relationship with the finance team. They will be shocked and delighted to find that you are interested *and semi-literate* in their language!

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## E-Mail.

Oh my gawd... email... what a mess. I AM SO OUT OF LOVE WITH EMAIL or I should say, with how email is being abused.

Frankly speaking most of us are living in email hell.

Look. Once again, just like project management, this isn't hard but there has to be some simple rules.

Email is a vital tool. It can be brilliant for instant sharing of status to all stakeholders for example. However, like all tools it can be misused.

These are my rules for lowering the noise levels and keeping everyone sane.

1. **Kill the paranoia culture.** People use email to document every little thing. That's contagious. An email must have a solid reason to exist.
  2. **Kill the "hey look at me, I'm busy" culture.** Oh Lord I wish I had a dollar for every email I've received. LISTEN. if I didn't set the task or if I have no action then guess what... I DON'T WANT TO KNOW! Keep your address lists relevant.
  3. **Use the hierarchy.** If you work for someone who works for me the only reason you would copy me on a mail to your boss is that you think they are not doing their job! If you do work for me directly then don't worry... I'll tell you when you are misusing email 😊
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4. **Action owners.** Do not give me an action and then have my name on the CC line. To sort out the stuff that matters I send all cc mail to a low priority folder. If you need something from me then it's not appropriate to CC me! Put me on the TO line where I belong!

5. **Shotgun bandits.** DUDES! I hate this... 8 people on the TO line with an action required without a specified owner. Just who exactly do you want something from? perhaps you would like all 8 of us to do it in parallel?!

6. **Attachments.** wow.. here we go.. my pet hate number 3. Sooooo many times I have to open a word or excel attachment for some ridiculously small table or paragraph which could simply have been pasted directly in the body of the email. Don't do that, please.

7. **I am not psychic!!!** Believe it or not, I have more going on in my life than just you! Quickly recap the situation and tell me exactly what you want from me! Respect my time. Give me what I need to make the decision you are looking for.

In conclusion. Earn the gratitude (and attention) of others by being constrained, brief and clear in email use and distribution.

## Marks Mantras.

### Striking the balance between time and budget-

Case 1: Recently my wife delivered twins after a pregnancy of 23 weeks instead of the customary 39. At first glance that's 200% of standard production in 33% less time. Pure project management GENIUS with productivity and efficiency off the charts!

But wait... let's look at the budget. The average cost of a baby from conception to christening runs a couple of thousand bucks. Our amazing productivity and time gains cost closer to \$3M and so, from a project management point of view this was a disaster.

Case 2: If I need 10 holes and each hole takes a man a day to dig I would probably put 10 men on it and finish in a day. Doing so is the cheapest solution because it minimizes set up time, uses available resources without any supply and demand premium and there is no ongoing management overhead. But what if its 1,000,000 holes that are needed? There may be several reasons why I can't hire 1,000,000 men and so we encounter the concepts of managed throughput and resource alignment.

As a project manager you must strive to achieve the task in the most efficient cost effective way unless the boss tells you there are other factors to justify extra expense in exchange for speed.

## The project manager role-

Being a project manager and leader is a lot like conducting an orchestra.

Every great orchestra has one **even though all the musicians are individually brilliant at their instrument and would muddle through to a reasonable result without him.**

The conductor doesn't personally play the kettle drum, tin whistle or flute but s/he releases the synergy whereby that group of skilled professionals perform better together than they would have as individuals.

## Perspective-

"There aint no point in talking when there's nobody listening" Delivering a project and leading a team is serious professional business but keep it in perspective.

Unless you are leading a platoon into battle or performing brain surgery there is some room for a little stress relieving fun along the way.

With all iron fist and no velvet glove you eventually lose your audience. A big part of getting people to support you is remembering to stay human.

It always pays to remember that you have no idea what people are dealing with in their personal life.

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## **Don't be an ass!**

### **You can't demand respect, only earn it-**

Past achievements give you a little opening credibility in front of new people, but not much!

There is rarely any opportunity to “rest on your laurels”

It's amazing how quickly the kudos of that last victory evaporates to put you back under the microscope.

### **What it is to be professional-**

There is an ugly and elitist definition of “professional” which seeks to reserve the term for those “belonging to the learned professions” That means Doctors and Lawyers apparently.

I object, your honour!

Whatever someone does to put bread in his bowl is his profession.

You act professionally when you do your profession to the very best of your ability.

So far, I have been a professional soldier, barman and cleaner on the road that led to CTO and General Manager.

When I cleaned a toilet you could safely eat off it.. I'm not sure why you WOULD, but you COULD!

All honest work is honourable and anyone who gives it his or her best is a professional.

### **Look to Dr King!**

I have two favourite Doctors, Dr King and Dr Seuss!

In the style of the latter: *Oh Yes! You have heroes who wrote brilliant words, but don't you go quoting, there's copyright nerds!*

I entered the quagmire of seeking approval to quote Dr Martin Luther King Jr and gave it up! Please google his words on sweeping streets like Shakespeare wrote poetry. I can't say it better than him!

### **A little logic process for life-**

1. Get out of bed
2. Do your sincere best
3. Go to bed
4. Test question: Did you wake up dead?
5. If No: Repeat
6. If Yes: Enjoy a well-earned rest

Nobody can expect more.

If you've truly given any job your best shot, then nobody else's opinion matters.

The flip side is that YOU always know in your heart if you did all you could and nobody is a more critical judge than that guy in the mirror. I hate that guy sometimes!

### **Leadership in a nutshell-**

Firstly, I don't think you can have effective management without leadership and leadership is not necessarily for everyone.

From time to time someone is made a manager despite being a terrible leader. It happens and makes everyone miserable.

We all hope that the situation is identified and rectified. If not, you may have to remove yourself from the situation.

Let's stick to the premise that leadership should be a mandatory skill for management. Therefore, management is not for everyone.

Most people honestly prefer the simplicity of being led and a 9 to 5, 40 hours a week job. They find the prospect of taking responsibility and leading others intimidating.

A leader doesn't avoid responsibility or obsessively count the working hours. S/he just quietly does whatever it takes.

A leader has to have some confidence to get started. You can't be a great leader without first having been a great follower. As a follower you learn something about what does and doesn't work. Pay your dues.

It is important to note the distinction between confidence and arrogance.

- The former comes from knowledge and earns respect.
- The latter, comes from ignorance and merits contempt.

A leader must constantly demonstrate sincerity, integrity, competence and consistency together with the willingness to step up and be responsible.

### **Business Ethics-**

As projects get bigger opportunities for corruption come your way.

Some are subtle schemes for the abuse of inside knowledge and some are blatant offers to enrich yourself through unfair or unsound allocation of business.

There are no shades of grey here, just pure black and white. You are either honest or you are not.

Some would tell you there are no victims in their schemes but that's a lie and self-delusion from those who chose corruption over integrity.

If you are being enriched outside of your agreed compensation package, then somebody else is being deprived of their legitimate earnings.

As a project manager you are a custodian of your companies' money. The only way to behave is to spend every penny exactly as if it were your own, in trust.

In the end its about your integrity, the bedrock of who you are, the example that you project and how you will be remembered.

Unimpeachable ethics are priceless but cost you nothing.

If you deserve more money go out into the marketplace and properly sell yourself.

**You cannot lead from the rear-**

You must be the example and it's relentless.

Don't expect others to do something you wouldn't do or to meet a standard that you won't uphold yourself.

## **Working hours-**

We have all met the 100 hours a week martyr.

From time to time we will all be faced with the need to pull some extraordinary unpaid overtime.

That's part of the deal in a commercial world because some situations cannot be anticipated and planned for, such as:

- Responding to a tender / RFP
- Dealing with a natural emergency

However, if a 60 to 100-hour week becomes the standard for yourself or your people then you have failed in your resource planning.

Nobody can sustain efficient performance after weeks and months of madness.

## **It's often about asking the right question-**

I've had a boss with the infuriating knack of cutting right through all the issues with a question that exposed a weakness in my planning.

It was infuriating not because he was invariably correct but because I hadn't seen it for myself. I soon

learned the skill of asking those direct compelling questions of myself first.

To achieve this, step back from your project and ask yourself the basic control questions.

- Are we addressing the whole task?
- Are there any opportunities to cut cost or timeline?
- Are we on track and correcting for any variations?

Put yourself in your bosses' position, what does s/he need clarity on? What matters to them?

Doing so pre-empts them, saves them time and they will be appreciative of your consideration of their need for clarity with brevity.

This is a valuable habit that will greatly improve the quality of your work and raise your profile with your management.

### **Have a little faith in yourself-**

You are in a leadership position because someone believes you are capable and has invested in that belief.

Insecurity is crippling (not to mention embarrassing!)  
RELAX! If your company isn't happy with you I promise  
you they will let you know!

### **Distance yourself-**

You are the teams' boss and leader, not their buddy.

People will respect you if you deserve it. They may not  
necessarily "like" you.

Get over it.

Have the courage to stand apart from them and do  
your job.

Yes, it can be lonely at the top and it is possible /  
necessary to make one or two senior staff your  
trusted confidants or friends, but remember:

- the buck always stops with you, and
- when you have to manage your friend, just do  
it without fear or favour.

### **Delegate or Die-**

As a leader you must delegate or die. Many fail  
through being too timid to require their staff to step  
up and play their role.



You can NOT cover for lazy or incapable staff by doing your job and theirs for any length of time.

Remember there are only 24 hours in a day, yours will be plenty full enough dealing with your own responsibilities!

### Nautical but nice-

One simple rule, there are no passengers on my ship, only crew and everybody has to pull his weight. If someone thinks they are going for a pleasure cruise under my management they quickly learn otherwise.

Let's stick with the ship analogy while it keeps working so nicely. 😊

There is a reason the bridge of the ship is up top with a commanding view. You get the far and wide views you need to avoid dangers but you are close enough to get to the engine room in a hurry if necessary.

As a project manager you have an advantage over the ships captain in that you design and build your ship yourself. You plan how big the engines must be, how many crew of what specialties are needed, how fast she goes and how far she can lee without capsizing.

Now I'm going to add a helipad and a neat little chopper onto the foredeck of our ship.

**Fly bys-** now and then you must get up above it all to see over the horizon and how your project is sitting relative to the world around it. From 10,000 feet in the air you get a perspective on these macro issues. What you learn up there will lead to adjustments when you get back down on the bridge. If our pilot sees an iceberg, then our captain can launch a torpedo. That way the iceberg becomes nothing but ice blocks for his well-earned whisky.

In project management you achieve this by stepping back. Get your head out of the details and take a look at your fundamental kpis.

**Joke break:** An executive in a new BMW is driving along next to a mental hospital and gets a flat tyre. Mumbling and cursing he is half way through changing it while a man wearing a straight jacket is smiling at him through the fence. Suddenly lightning cracks and it starts to pour with rain so our executive takes shelter in the car. When it passes he opens the door and realizes that the four wheel nuts have washed away. He loses it and starts jumping up and down cursing. The inmate in the straight jacket calls out .. “Mate.. take it easy.. no big deal, just take a nut off each of the other 3 wheels, mount the 4<sup>th</sup> wheel and off you go perfectly safe to a garage” .. Well.. the executive stops and looks at him and says “That’s brilliant!.. of course!.. but excuse me for asking, why are you in an asylum? The inmate replies... Mate, I’m in here because I am insane, not effing stupid!

.. that was a long way of illustrating the fact that you need to lift your eyes and look around now and again!

**Deep dives-** To really know your project you have to spend some time below deck to see for yourself how your systems work in the real world. You designed them based on your experience but the engine room chief who lives and breathes it will always know how to make things run smoother or to squeeze out a bit more horsepower.

Ok, enough with the ship but for one final thought.

**Scurvy Dogs-** Rarely you have no choice but to make some scurvy dog walk the plank. Go to great lengths to guide and adjust people but when they force your hand do what you have to do. Your primary responsibility is to protect the crew and the mission.

In 35 years I've fired two people because extreme efforts failed to bring them up to an acceptable level.

C'est la vie, may they rest in pieces.

### **Reporting and the tools to support you-**

As a project manager you are deeply into the details. Many times I've DREAMT about project elements when they got intense.

For your own sanity and upward reporting you must establish a simple, repeatable and accurate "Reporting Dashboard".

A medical doctor spends 5 years learning thousands of facts and biomechanical system interdependencies but s/he ALWAYS starts by listening to your chest, and taking your temperature, blood pressure and pulse.

In medicine, these are your vital signs. In our world they are Key Performance Indicators (KPIs).

On a big project you will need to track and measure dozens of KPIs related to finance and progress of the task vs the plan.

You can't report all that detail upwards. Your bosses don't have the time or possibly even the specialist depth to make use of it.

The Dashboard distils all that critical information into a few simple key performance indicators. Even the biggest project needs only a few top level KPI for upwards reporting. If these stay in the green your management will gratefully never ask to see the details. That said, you better have all the minutiae available for your own regular reference AND upwards reporting if anything goes wrong.

On a recent national project with a \$US16M budget I was able to report monthly to the board "We are on track and under budget, is there anything else you'd like to know?" Most months there were no questions.

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If there were I would always have a few KPI ready showing Plan, Actual and Variance.

If any KPI is trending behind plan always have a brief explanation of the corrective action initiative/s to correct it.

Main KPI examples are:

**Finance KPI:** Show that spending (and revenue where appropriate) are within budget and questions will usually stop there. Be ready with down to the penny line by line details if requested. Expect to be challenged to cut costs. It is reasonable for a board to push you to do better no matter how well things are going

**Progress KPI:** Depending on the task I usually have accumulative and week on week results alongside the planned expected result. The difference between plan and actual is the variance. If "actual" lags "plan" then take the appropriate steps to correct it and highlight both the issue and the solution as bullet points in your report.

Even a large project will only need two or three progress/finance kpis and half a dozen bullet points of flags with the corresponding actions. Everything else belongs in the annex should details be called for.

**Great clean reporting is automatic in a well-run business-**

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Reporting can feel like an onerous time consuming task.

It's easy to dump a big ugly pile of data together and pretend you have made a report.

**The real work is in the distillation of a that pile of information into a few powerful words.**

I use the term **“idiot proof and grandma friendly”** .. not in order to insult anyone but to make my staff think. They are living and breathing the project so they have to force themselves to consider their readers. If your average 12-year-old child can clearly understand your report you have hit the mark.

I've often heard "do you want me to report or work" from frustrated staff and peers. Those guys don't get it!

To manage effectively you must be fully across how your project / business breaks down into KPIs and how the reality compares to the plan.

If you are not already structured to get that KPI data flowing daily, then you are not doing your job.

The REPORTING part is simply filtering those select KPI into a few lines and this task should be automated.

If you invest the time to set up and automate all of this at the outset you will save yourself much heartache and time and look like a hero.

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## Managing upwards-

The preceding thoughts focused on leadership or managing down.

Everyone has a boss (or three!) and a key role as a middle manager is bridging between your bosses' expectations and the constraints s/he may not be fully aware of.

By the way, your boss is unlikely to be an idiot unless your company is foolish enough to practice nepotism.

The major part of managing up is

- agreeing on the goal / task definition
- providing clear concise reporting.

## Managing Sideways-

Managing sideways can be tricky. Competitive egos and confused responsibilities are dangerous.

**Responsibility shared is accountability lost.** – isn't that clever? That's my own original contribution to the world of clichés.

I would always prefer to be tasked as the responsible manager compared to any kind of shared responsibility.

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If multiple owners for a task is unavoidable it's critical to set clear boundaries for who owns exactly what. Some people will consider you a "control freak" and that's fine.

Nobody is ever going to be able to accuse me of dropping a ball because I know my balls!

**“A Camel is a racehorse designed by a committee”**

**Real life story:** I had a project manager who was technically excellent. Very thorough, had his plan in play, excellent reporting and perfect records. His fatal flaw was to become aggressively defensive when questioned by senior management. It's one thing to feel a sense of ownership (GOOD), it's another thing to obstruct questions from the CTO (BAD!)

It's all about attitude.

This is no criticism of teamwork.

**Teamwork is great but there is a reason that every team on earth has a captain.**

All teams work better with a leader and all teams follow the rule that 20% of the people do 80% of the work.

Furthermore, there is always some clown with a knack for claiming credit beyond his due. Don't get mad, just know who you are dealing with.

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## The 2 step career advancement process-

Senior leaders are always looking for upcoming talent. If you consistently demonstrate the right attitude, work ethics and skill you will be noticed and good things will happen.

\* Step 1- demonstrate yourself

\* Step 2- management will recognize you.

Some people think it should be the other way around....

It's not.

**"The harder I work the luckier I get"**

## Have a positive "can do" attitude-

When she was 50 my Mum would still refer to herself as "middle aged" .... I love an optimist!

**"My plan is to live forever, So far So good!"**

(note-this joke was funnier at 30 than now at 52!)

Your attitude sets the tone of the team.

Even disasters can be framed positively as a lesson learned.

**“We don’t see things the way they are, we see things the way we are”**

### **Preconceptions-**

Preconceptions are the windows through which we see the world. We have to clean them every now and then.

Do not be a prisoner of your pre-conceptions.

There may be a new innovative idea that can deliver results you would have previously thought impossible.

This cliché is a cornerstone of success.

**“What you can conceive and believe you can achieve.”**

This fact was brought home for me quite recently.

In August 4<sup>th</sup> 2012 in Myanmar our Chairman arrived for a project meeting. We were on track according to the original brief with 40 signed leases and a trained staff of 30. We were to deliver 362 leases by the end of the year.

Feeling secure, I did my usual thing and reported being on track and on budget.

Then he dropped his bomb and demanded **2900** by Christmas. An 800% jump in scope within a fixed timeline.

Now, I love a challenge as much as the next guy, but, on the surface this appeared to be hilarious / ludicrous.

**Based on past experience it was simply impossible.**

However, he provided the money and my team and I ran like mad. We trained 600 staff, established 14 regional branch offices and achieved the goal on December 23<sup>rd</sup>.

All of us took away a lesson in preconceptions.

### **Celebrate success-**

Team milestone recognition gets everyone involved. It's hard for a junior administration assistant to make a huge personal difference to a project outcome but s/he certainly plays a role and can see if this is understood and recognized by a thoughtful manager.

Some obvious team "occasions for celebration" are significant production milestones being achieved on time.

Such events cost little and yet pay dividends.

## Self-praise is no recommendation-

For the most part always let other people, your deeds and reputation speak for you.

Facebook has everyone addicted to “likes” and the absence of positive re-enforcement can make us feel insecure.

Your boss will surely let you know if s/he isn't happy but can sometimes be slow with a pat on the back.

It's great when it comes and as a manager I consciously recognise those who merit some special appreciation.

Not every boss works that way, so, if you are performing well don't be "needy" for constant positive feedback.

One exception is contract negotiation time.

## Show me the money honey-

You, as an individual ARE ALWAYS self-employed. Sure you draw a salary but **your business** is the sale of time.

On average God or good fortune gave you about 57,000 hours to sell in this lifetime. It's really not that many is it!

If it were apples or diamonds everyone would work hard to get a good price. Why doesn't everyone think the same about the hours of their life?

It is likely that you can negotiate a better deal for yourself before signing on the line if you concisely emphasize and substantiate your value.

If you demonstrate a proven history of saving millions it would be prudent for your employer to pay a premium for your abilities.

However, once given, your contractual commitment it is your word of honour and it is never appropriate to attempt a re negotiation mid task. Seeking to negotiate mid task is called extortion and will not go down well.

### **Applaud publicly, discipline privately-**

It's almost ridiculous how much everyone gains from the use of SINCERE public praise. It costs NOTHING to make the individual or team aware of an extraordinary achievement but the benefits are out of this world.

Not only does the recipient get a genuine warm fuzzy feeling but the whole team sees that honest efforts are being recognized thus raising the bar all around.

The key word here is sincerity. Let's not fake enthusiasm for winning 9<sup>th</sup> place in a three-legged race.

It's a very poor manager who doesn't exploit every chance to look after his/her teams' interests in this way.

### You "lose face" when you lose it-

Certain cultures have a fabulous capacity to be unreadable. Latinos and Asians are generally so much better at this than Caucasians.

In my own personal case with red hair and translucent skin anybody can clearly see if I'm not happy. It's not fair, they can read me like a book.

Once in Cairo I trained a young Engineer to produce a product. I went into every detail, including the construction of a prototype sample. He went off and spent considerable money on a production run and the product was HORRIBLE. It was if I had specified a DUCK, given a sample DUCK and received 2000 rattlesnakes...

But worse, they were UGLY and unusable rattlesnakes! I was not a happy camper.

The guy looked at me and shocked by my face he said "Mr Mark, why are you so *nervous*?".. I lost it and shouted "Im not #ucking nervous, Im #ucking

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FURIOUS!.. I came to know that in Egypt the word “nervous” is commonly used in place of “angry”. The same guy couldn’t understand my reaction when his solution to a locked site door was kicking it in! 😊

My wife is Indonesian so I have had occasion to see them in action. Their faces are impassive.. happy, sad, angry.. whatever.. it all looks the same, kind of an ever present half smile. I find their patience is inspirational. Its all fabulous of course, until you cross that line and BOOM!

It reminds me of a gorgeous little Maltese my wife once owned. It was all cute and loveable until it leapt up to rip your arm off at the socket for getting too close to its snack.

So anyway, at work you need to be demonstrably cool, calm and in control. That said, you must also protect your great people from a non-performer with a bad attitude.

Discipline of any serious nature must always be done in private. Sometimes however, a measure of public admonishment perhaps wrapped up in humour can be effective. The secret sauce is to be respectful.

All discipline must always be within a clear and consistent process understood by the whole group.

Peer pressure is your ally here.

## Make decisions and ACT on them-

You will often have to make decisions before having all the details you would like.

Trust your guts and MOVE FORWARD. You will be 100% right almost every time and mostly right the rest of the time.

This is a key leadership characteristic to develop. People will follow you when you are decisive.

Procrastination is a killer. Don't overthink it.

This one came from my Dad who got it from his boss when serving as an Airforce Officer. *"For Gods sake make decisions, you will be right almost all of the time and if you get it wrong, we will handle it"*

**"It seems the more I think the less certain I become!"**

## Oops-

**"I thought I was wrong once, but I was mistaken"**

Almost everyone reading this will have made a MONUMENTAL fudge on the computer at some point but saved the day by clicking "Undo"!

I love "Undo" and can't tell you how often it has saved my butt.



As a student immersed in learning computers my mind was writing assembly language while my body mowed the grass. I mowed straight over my ex-wifes favourite plant, instant mulch...

I screamed UNDO! UNDO! To no avail... is it any wonder so many people prefer virtual reality over actual reality?!

In the real world, being a leader who trusts his guts and makes decisions that are right almost every time means that on rare occasions you get it wrong.

Unfortunately, there probably isn't an UNDO!

When that happens you must immediately and publicly confess the fact and take full responsibility.

**"The only people who never make mistakes are the ones who never make any decisions".**

There is no shame in it and quality senior managers will always back you every time.

You bet there is always some smug smartass Monday morning quarterback / armchair expert ready to say "I told you so"... funny thing however I never see them reach my pay grade.

## Know people-

Entrepreneurs, Salesmen, Lawyers, Accountants, Scientists and Engineers are each incredibly different personality types. Different species in the zoo of humanity.

It's hard to believe they can actually inter-breed.

Each specialist graduates arrogantly believing his/her skill is the centre of the universe and they are all wrong.

LEADERS can emerge from any group when they understand co-dependant relationship management techniques and how to teach others about them.

I'm often reminding my operations people that NOTHING happens without a sale. The rest of us are a support organisation to the sales team. I understand that many people, especially finance and engineering find this hard to swallow but it is absolutely true.

That said, I'm also reminding the sales force that they best remember who it is that sweats blood to deliver on their promises.

The reality is that we are all key and interdependent. Sales, Finance, HR, Legal, Engineering and Operations so nobody should get too cocky.

## Empathy- "Walk a mile in my shoes"-

My Dad was the greatest man I ever met, so far at least!

Among other things he taught me that clichés exist for a reason. They are time tested truths which we can safely base our lives on.

This little collection of mine is full of them.

“There but for the grace of God go I” is possibly the most powerful of these.

The fact that each of us might just have easily been born a resented girl child in a destitute swamp somewhere in central Asia should in itself cure us of entitlement, arrogance and racism.. of course it doesn't!

Consider what might be driving every person you interact with.

## Keep it real-

In the world of Engineering and particularly in Telecommunications we have seen a fundamental change since the 1970s.

Before then, telephony and related services were public utilities like water or gas, run for the most part by Engineers on behalf of Governments.

Profit was either not considered at all or it was regarded as a somewhat crass secondary concern.

Even in the giants of the private sector such as Ericsson or GE an Engineer was likely to be in the captains' seat putting tremendous emphasis on processes and quality.

These guys used to take their time to churn out products of fabulous intricacy and quality to last 100 years.

All this was fine for the times but as technology advanced our needs changed and financial control correctly took precedence.

**Don't build me a Lamborghini when I asked for a Toyota.**

### Ask questions-

Quite simply, don't pretend to know something if you don't. That drives me nuts and can only lead to a disaster.

I once spent 8 hours driving the wrong direction through the desert in Saudi Arabia because some guy told me with great confidence and big smile that the town I needed was "over there"

Experience has proven to me that if I don't know something then the bulk of the people around me don't know either.

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Be brave enough to stick your hand up. It really is true that there are no stupid questions.

### **Core Business-**

A business must know its purpose, its "reason for being".

This first step in understanding itself sets a strategic framework for all subsequent managerial decisions.

Think of a canoe where everyone is paddling to his own agenda vs those same paddlers working together to the cadence of a drum.

### **Break it down-**

#### **"How do you eat an Elephant? one bite at a time"**

Step 1 -Every project of every scale can be broken up into logical more easily managed parts.

Step 2 -When you have visualised a problem in bite size bits it becomes easy to see the sequential dependencies, and, the opportunities to do things in parallel to save time and money.

Ta Dah! You have a "work breakdown schedule", "Gantt chart" and "project plan"

It's just a vision of where you are going.

That wasn't so hard was it!

### **"Failing to plan is planning to fail"**

Have a plan. If as the manager YOU don't have clarity about what you must achieve and how you will get there, then there is no point in expecting people to follow you.

Communicate the plan. Give your people the vision.

- Make them challenge it.
- Make them sign off on it.

Getting your team engaged this way improves the quality of the plan because they feel part of the process.

This sense of ownership and accountability makes them take much more care than they would otherwise.

They will be more effective and motivated if they see how their responsibilities fit into something bigger.

### **International Projects- Language and Culture-**

This life brought me through 50 countries and gave me a whole world of perspective. I've been subjected

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to racism as well as privilege and have come to understand what truly ties humanity together regardless of race, culture or religion.

Most fundamentally, there are a few horrible human beings wherever you go, identified by their ignorance, arrogance, greed, vanity and selfishness. Let's not waste time thinking on them, life is too short.

More importantly, there are some beautiful human beings everywhere characterised by their generous kind happy spirit.

Material wealth is most decidedly not a factor unless we concede that the percentage of horrible people is positively correlated to the GDP!

I have found that success in multilingual, multicultural environments hinges on a few simple principles.

- Saying Good Morning and smiling is 90% of the "secret"
- By default, people will give you the opportunity to fit in positively. There are more good people than bad even if sometimes it's hard to remember that!
- Every country everywhere thinks it's the best at something.. find out what that is and say it often.

- I always develop a front line of bright positive bilingual staff.
- Learning a few words of the local language is always well received.

I've had a few amusing incidents in this area.

Back in 1995, before my first overseas project in China I took half a dozen classes in Mandarin. That got me to lesson 3 of book 1. For the record, lesson 1 of book 1 was "Is this your car?" which I got to use in the airport taxi!

Throughout the China project I was followed everywhere by a dozen young Engineers who would politely but firmly take any tool from my hand and have me talk them through it via a translator.

Consequently, the 7-day job took 10. These guys love meetings. At the final meeting I wanted to try my hand at international diplomacy and said "Sheh Sheh nimen, nimen wo de pongyou ren!" .. I knew something was up when they all started smiling at their shoes.

My translator came over and asked "You MEANT to say "thank you everyone, you are all my friends" didn't you?" .... I said yes and asked "so what did I say?" ... **"Thank you everyone, you are all Fat Girls"**

Oooops.

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On a related subject I never really understood why the good people at Rosetta Stone language software feel their Spanish Language customers should learn “One Elephant” (Un Elefante!) in the first lesson. Very strangely I actually used that on a trip to Bangkok with a Colombian when I was either very drunk or “un elefante” truly appeared on Sukhumvit Soi 4...

Anyway, I digress.

Some years later In Jeddah I did a midnight job on a microwave link between two Saudi Telecom sites. I had to kick on the telephone exchange door at 2 am since my hands were full of equipment and I had to wake the guard. When I convinced the guy to let me in he followed me up the stairs and grabbed my ass with a big grin. I knew two Saudi words that implied the negative.. “La” and “Mafi”... with arms full and ass cheeks firmly clenched I yelled

“LALALALALALALALALALAMAFIMAFI!!”

**As you see, learning a few words might come in handy!**

## Stretch-

**"What you can conceive and believe you can achieve."**

Set goals about 20 percent higher than what you must achieve and have committed to your manager. These stretch goals will compensate for unpredictable obstacles so you land where you need to.

**"Shoot for the stars and land on the moon"**

Crazy out of this world demands or stretch goals are not clever, they set the stage for failure and it will all end in tears.

In this you may have to negotiate with your boss. Just keep it calm, have your facts ready and be open minded.

Challenge conventional wisdom. Perhaps there are methods s/he will suggest which you hadn't thought of.

In the end though, you can't lead it if you don't believe it. Do your absolute best to find a plan you can put your hand on and say is viable, but, if you just cannot find common ground be strong enough to tell your boss that you can't commit to his/her wishes.

Your sincerity will either win them over or result in your replacement **and either outcome is ok.**

## Resource for your needs and plan for spare-

So far we have talked about defining your scope of work, task sequencing and project timeline to make a plan which you believe in.

Now it is necessary to ensure your goals are adequately supported by the necessary human, material and financial resources.

### "Neither wise men or fools can work without tools"

Take care with finance. You must work in closely with the CFO to ensure they fully understand your cash flow needs and progress. You do not want your otherwise excellent progress to be tripped up over delayed vendor payments.

## Meetings-

Hold regular, brief disciplined meetings using a tool that clearly tracks actions from conception to closure.

Set an expectation that meetings **start on time**. Show people that if they are late the impact is multiplied by the number of participants. Being late is very disrespectful of other peoples time.

**Brief** means no more than 1 hour absolute maximum.

The meeting must have a valid purpose. Time is precious.

Directly ask each participant if they are ok or wish to comment / contribute. Encourage them to be active.

An **action** must describe a **clear specific task**, be assigned to a **specific owner** and have a **defined due date**.

A meeting without actions and a tracker is just a social gathering that wastes everyones time.

Send the minutes / actions promptly after the meeting and follow up with the same message at suitable intervals until the actions are closed.

Loud-mouthed disorganized people HATE minutes and actions because it quantifies and measures progress. This makes them accountable.

Stick to your guns.

### **The circular nature of planning-**

Some folks call it elaboration.

We usually have to get started with the basic information but not all the details. This crystal balling is a risk obviously.

If we are way off in our planning the result can be a disaster.

Through necessity, keep the planning simple and high level at first.

Sometimes (very often!) trying to do this in a software tool can be more of a project than the project itself.

Don't underestimate the power of a whiteboard or pencil and paper to structure your thoughts. I personally move to a simplified Gantt chart in excel to illustrate key tasks, milestones, sequencing and dependencies.

MS Project has a place. It can allow collaboration and is sometimes a contractual requirement, but, the hard truth is that most people don't know what they are looking at. [Here is a simple Excel Gantt](#) that ties back to an earned value (EV) curve which was sufficient to control a multimillion dollar project.

Over time, real life, real time feedback allows you to **elaborate** the baseline plan and budget.

Obviously, it's hoped that your actual performance doesn't vary too wildly from that baseline plan you laid down with all my wonderful advice!

## To conclude

If I am to try to convey the simplest most important points to a developing Project Managers, it would come down to this.

- Invest time in clearly defining the scope of the deliverable/s
- Brainstorm the summary tasks into sequence and dependencies
- Flush out all opportunities to execute in parallel
- Lock in a baseline plan
- Carefully account for direct and indirect costs
- Set out your budget plan and actual
- Track your capex actuals
- Get clear approval and buy in from the boss!
- Do your honest to goodness best
- Be the example
- Be generous with praise for all success
- Take responsibility for all failure
- Measure, React, Report
- Take a well-earned break when you collapse into bed each night.
- Repeat for 40 odd years!

I hope some of this was of value or interest and wish you all the best on your journey, may it be as fantastic as mine!

And now, the end is nigh.. some say always end with a joke, and so...

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**Final Joke break:** A Project Manager on a business trip checks into a hotel and being very tired he calls the front desk and books a wake up call. The following morning the phone rings at 7am. He picks it up and a voice says.. “what are you doing with your life?” .....

## Annex 1- A Simple Gantt Tool

Most projects can be professionally executed using readily available and broadly understood tools.

I have seen some mad things over the years because some manager somewhere thinks having MS Project Gantt charts as wallpaper proves something.

Make sure your tracking tools are not a bigger project than the project itself!

This is an example of how a simple spreadsheet can convey top line tasks, dependencies, sequence and schedule. It can also easily tie back into Earned Value “S” Curves should that be attractive.

You don’t need a specialist tool; **you need a simple, clear, structured, logical and well-presented approach.**



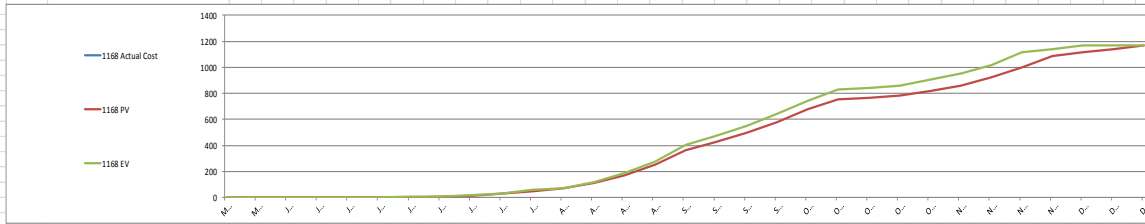
**Simple Gantt  
Project Week Number  
Calendar Week Number**

Week Ending Saturday

**Tasks and Milestones**

Tasks and Milestones	% of scope	From	To
Budget Approval	1%	18-May-15	
PMD engaged	0%	21-Jun-15	
Purchase Orders	5%	30-Jun-15	22-Jul-15
Execute Task 1	8%	20-Jul-15	30-Aug-15
Execute Task 2	10%	20-Jul-15	30-Sep-15
Execute Task 3	25%	27-Jul-15	7-Oct-15
Achieve key milestone	0%	9-Sep-15	
Execute Task 4	10%	3-Aug-15	2-Sep-15
Execute Task 5	20%	5-Sep-15	25-Nov-15
Achieve key milestone	5%	1-Sep-15	
Execute Task 6	5%	2-Sep-15	23-Nov-15
Execute Task 7	1%	5-Sep-15	29-Nov-15
Execute Task 8	10%	24-Sep	15-Dec-15
Closing	0%	15-Dec-15	
	100%		

Curve	1168	Budget in Millions	May-16	May-16	Jun-16	Jun-16	Jun-16	Jun-16	Jul-16	Jul-16	Jul-16	Jul-16	Jul-16	Jul-16	Aug-16	Aug-16	Aug-16	Aug-16	Sep-16	Sep-16	Sep-16	Sep-16	Sep-16	Sep-16	Oct-16	Oct-16	Oct-16	Oct-16	Oct-16	Nov-16	Nov-16	Nov-16	Nov-16	Dec-16	Dec-16	Dec-16	
Actual Cost																																					
PV			3	3	3	3	3	3	3	5	14	32	45	68	110	171	252	365	426	498	581	676	754	766	784	815	861	922	998	1,089	1,115	1,141	1,168				
EV			3	3	3	3	3	3	4	5	15	32	57	73	115	188	278	401	471	550	641	745	828	842	858	903	953	1,019	1,114	1,139	1,168	1,168	1,168				



## Annex 2 - Recommendations

**Self-Praise is no recommendation.** I am grateful to past colleagues who took the time to provide these.

*"I worked with Mark on the Digicel Panama Rollout team and always found him a pleasure to work with. As the Director of the Panama Rollout Project, I found I could always rely on him for support when needed. He has a great combination of diligence, attention to detail and business acumen. Factors which ensure he will always deliver a project on time and in budget... and with a great sense of humour!"— HC, Senior Service Layer Design Engineer / Rollout PM*

*"I had the pleasure of working for Mark on several successful rollouts including Guyana, El Salvador and Suriname. As head of Network Rollout for these projects, his responsibilities were enormous – ranging from site acquisition to service layer and IT - yet he was always able to effectively manage the key issues and progress. He had a unique ability to motivate and organize teams to achieve next to impossible deadlines and goals. Additionally, he was an excellent team leader - very approachable, trustworthy and extremely effective when presented with escalations."— KM, Service Layer Rollout Manager*

*"Mark has a unique hands-on management approach with a wide and detailed technical knowledge. He is always prepared to take decisions, clear uncertainties and conflicts in an often ambiguous environment*

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*without losing sight of business and organizational objectives. I recommend Mark without reservation."*—  
**TF, HR Director**

*"Mark is an excellent manager, very high top level. Always facilitates the keys for reach success. Mark makes possible to achieve goals that seem to be impossible. Great communicator, excellent negotiator, intelligent managing of troubled situations. Integrity first of all, professional all time. I am very honoured of having been worked with Mark at Digicel Panama's Project."*— **RS, Implementation Manager**

*"I had the pleasure of working with Mark in Haiti and then while deploying green field operations in Central America. Mark is a highly professional and effective manager. The management of his projects resulted in successful launches and great new business opportunities for his organization."*— **FM, Account Manager**

*"I have had the opportunity to work throughout 6 years with Mark as my Rollout Director / General Manager in many different Telecommunication Projects across Central America, Caribbean, and currently in Myanmar where every rollout has been a total success. Mark is type of boss who naturally has the ability to motivate a person/ team to care about the task/project and the success of it with clear goal objectives by showing strong leadership, respect, dedication to his staff. Mark is one of those rare Managers who not only talks about being a team*

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*player but actually demonstrates it. In every project that I have worked with him when the extra effort and long working hours /days have been required Mark is the manager that stays helping out, supporting his team until the goal is successfully completed. Mark has been an inspiring mentor who always motivates me to take one more step in my career. I have learned something new from him every day. I would be honored to continue to work for him in any future project he leads. I strongly recommend Mark to anyone who wants their project to be more than a success."*

— **FP**, Business Process Analyst

*"I have worked with Mark in several organisations and on several projects. Mark has always shown a keen intellectual focus and perspicacity, grasping concepts and seeing "outside the box" to obtain superior outcomes. I highly recommend Mark and know he will achieve beyond expectations in anything in which he puts his focus.*

— **RH**, Manager of International Connectivity

*"Mark is a very professional and results-oriented individual who sets high standards for himself and his team. Against all odds, Mark completed successfully and within budget our network rollout in Digicel Panama and it is directly responsible for our successful launch in Panama."— **VS**, CTO Panama*

*"I have worked for Mark on 4 Digicel projects. His management style is very assertive, and he has an*

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*attention to detail rarely seen at his level. Mark gives more than 100% to his projects, and this is shown by the rate of success. His assertive style is nicely matched by a very easy going personality. I have worked in this industry as a contractor since 1992 and Mark is one of a handful of directors that actually understand the business and engineering aspects of the project. I highly recommend Mark to any future employer, he has a breadth of engineering expertise, management acumen, and project financial expertise that is difficult to find in 1 person."*— **PD, Technical Project manager / Regional RF Manager**

*"Mark has demonstrated great versatility in various roles from Technical to Business Group Management. Always eager to get on with the job, Mark is a positive individual who can effectively deliver the client's needs and lead teams for successful outcomes. I have no hesitation in recommending Mark."*— **PS, Technical Management**

*"I have been fortunate to work for Mark in several Rollout projects. Mark is a good manager and a dedicated and focused Project Manager. Directions and deliverables were always clear and there was trust that I would deliver what was required. Mark sets aggressive targets as required by senior management but these are always tight but achievable. Mark always makes time when you need to complain that things are too tight. There was never any fear that Mark would not represent our opinions*

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*and interests, making Mark almost the perfect boss to work for in a hyper aggressive environment. I have been very fortunate to work for Mark, who causes all of his people to step their game up a notch or two, and would be glad to do so again in the future."*— **JK**, IT Rollout Manager

*"Mark is an exceptional senior manager who has played a key role in the Digicel success story. His eye for detail, drive for results, ability to diversify and genuine concern for the success of every individual on the team have ensured that everybody in Rollout deliver 150% whilst driving costs and processes to an optimum. I would be sorry to see Mark leave Digicel if that situation ever came about, as I firmly believe that he is a core asset on the Digicel Senior Management team."*— **CW**, Radio Access Network Engineering Manager

*"Mark is one of the best Managers I have the privilege to work for. He is a great team leader that knows how to motivate his team and get their maximum productivity, but overall is a great person. He is very attentive to detail and inspires confidence due his high integrity, focused toward results and strategic thinking. He did a great job managing simultaneously the Rollout of Digicel in 3 Central American Countries. I learn a lot from him and for sure he is the kind of Directors/Manager that any company would like to have."*— **MZ**, Total Project Manager

*"Mark is a serious minded manager with a results oriented attitude. He is probably one of the strongest - and demanding- program managers that I have ever worked with. Mark's keen attention to detail, coupled with his strong business savvy, makes him an invaluable addition to any team. He strives for, and invariably attains, the best quality from himself and those he impacts. I have had the opportunity to learn a lot from him. He is a true asset to a team and I look forward to an opportunity to work with him in the future."*— **LA Account Manager**

*"The first thing I noticed about Mark when I first met him is that he is intuitive and knows how to get to people. He immediately knows what language to speak with which kind of people. The second thing I much admire about Mark is that he's uber detail-oriented and results-seeking. He never missed a tiny calculation flaw in daily numbers in the project. Thirdly, Mark is an extremely hard working man who always pulled all his time and energy to get the job done. He literally invested his life in his work. All in all, I would always recommend Mark as an outstanding enthusiastic and ambitious boss who always goes extra mile to finish the job. If you need a project to be successfully got done, Mark is the man"* — **ZM, Business and Operations Manager**

Teamwork is great but there is a reason that every team on earth has a captain.

Being a project manager and leader is a lot like conducting an orchestra.

Every great orchestra has one *even though all the musicians are individually brilliant at their instrument and would muddle through to a reasonable result without him.*

The conductor doesn't personally play the kettle drum, tin whistle or flute but s/he *releases the synergy* whereby that group of skilled professionals perform better together than they would have as individuals.

Project Management and Leadership tips for the real world.



Some meaty methods and attitudes, garnished with examples, wrapped in experience and lightly seasoned with humour. Easy to digest but filling!

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